

REPORTS MANAGEMENT

1. PURPOSE

Reports are vital to our Agency mission and to the efficient administration of our internal affairs. Also, reports make up a large portion of our paperwork. For these reasons we are obligated to assure that essential reports of the right type and highest quality meet our needs efficiently and economically. Such assurance can result from a systematic continuing review of our requirements for reports. This regulation therefore, provides for this review and for the coordination of our reports management objectives with those of other Agency components.

2. PROGRAM OBJECTIVES

The (component's title) Reports Management Program shall be continued to ensure that:

- a. Reports provide adequate, accurate and timely data for the purposes required.
- b. Reporting workloads are minimized and restricted to the capabilities of preparing and using components; and that peakloads and overtime are avoided.
- c. Only essential reports are established or continued.
- d. Reports are appropriate to the missions of using components; and that preparing components are the best sources of the data.
- e. Reporting procedures and systems are simple and orderly.
- f. Instructions, definitions, and forms are clear and complete.
- g. Existing sources of information are publicized.

3. DEFINITIONS

- a. Report An account or statement of information in written narrative, tabular, punch card, or graphic form, transmitted from one organizational element to another in response to an expressed or assumed need for information.

- (1) Administrative or Management Report. A report that provides for administrative or management control over an activity or operation, as distinguished from an operational or intelligence report.
- (2) Recurring Report. A report for which there is a standing requirement for its submission. It may be either a periodic report which conveys essentially the same type of information at prescribed intervals (daily, weekly, monthly, etc.), or a situation report which is prepared on each occurrence of an event of certain prescribed characteristics (e.g., report of an accident).
- (3) External Report. A report required from, or prepared for, any organization outside the (component's title).
- (4) Reports Management Officer. The official responsible for operating the (component's title) Reports Management Program.
- (5) Reports Control Symbol. An identifying symbol assigned to an approved reporting requirement.

4. PROGRAM ADMINISTRATION AND SCOPE

- a. All organizational elements of the (component's title) shall take part in the program. Each Division and Staff Chief shall establish measures to control and improve intra-division or staff reports, and to coordinate requirements for all other reports with the Reports Management Officer. Under this concept division and staff programs can be tailored to meet specific needs, with top level support and guidance being furnished for the control and improvement of external and inter-division or staff reports. The Reports Management Officer and a representative from each division and staff shall comprise a panel to review requirements for external and inter-division or staff reports.
- b. With the exception of the types of documents listed in Attachment 1, the (component's title) Reports Management Program shall cover all recurring administrative or management reports:
 - (1) Submitted within the (component's title).
 - (2) Received from or submitted to other headquarters components, domestic or overseas field installations, or organizations, Federal or private outside the Agency. Emphasis shall thus be placed on managing all recurring reports, whether prepared voluntarily, upon request, or by direction. However, this should not preclude the screening and reviewing of requests for one-time reports, if by such examination non-essential or inadequate reporting can be prevented.

5. POLICIES

- a. Report Directives. Requirements for reports and rescissions thereof shall be stated clearly and completely in writing.
- b. Essentiality. Reports shall be required only to collect essential information, as distinct from that which is merely interesting or informative.

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- (1) Direct and coordinate the Program by providing staff guidance and all basic plans, policies, and procedures.
- (2) Review and coordinate for approval by the Reports Review Panel all requirements for external and inter-division or staff reports.
- (3) Assign reports control symbol to approved requirements for inter-division or staff reports, and identify those reports exempted from control.
- (4) Coordinate requirements for external reports with the Deputy Director's Management Advisor for Reports, Management Staff.
- (5) Serve as Chairman of the (component's title) Reports Review Panel, and as a voting member of the Deputy Director's Reports Review Panel.
- (6) Conduct studies and reappraisals of, maintain records on, and publish lists of requirements for external and inter-division or staff reports.

7. PROCEDURES

- a. Request for Approval of a New or Revised Reporting Requirement. Any proposal to establish or revise a requirement for an external or inter-division or staff report shall be submitted to the Reports Management Officer. The originator shall submit the following material:
 - (1) An original and two copies of Form No. 142 (Attachment 2).
 - (2) An original and one copy (in draft form) of the proposed report directive, including all forms, instructions, and procedures proposed to be issued.
 - (3) Any additional supporting material that will assist approving officials with their review.

If the proposal concerns an external report, the Reports Management Officer shall place his recommendations on two copies of Form No. 142 submitted to him, and forward them with a copy of all supporting material to the Deputy Director's Management Advisor for Reports.

- b. Transmitting Copies of Directives. Immediately upon issuing a directive which initiates, revises, or rescinds a requirement for an external or inter-division or staff report, the originator shall forward a copy of the directive to the Reports Management Officer. The Reports Management Officer shall forward to the Deputy Director's Management Advisor for Reports, Management Staff, a copy of each directive concerning an external report.

U. R. WRIGHT
Director of (Component)

Attachments:

1. Types of Reports and Documents Exempted from the Reports Management Program.
2. Form No. 142, Request for Approval of a New or Revised Reporting Requirement.